

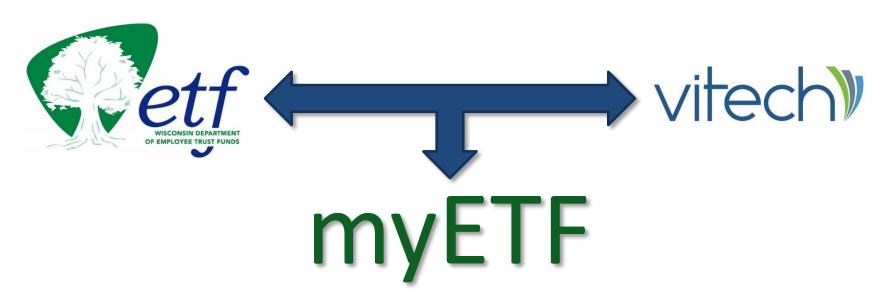
Employer Introduction to myETF

Project Orientation Summer 2016





The ETF, Vitech and myETF Relationship



The System License, Implementation, and Support Agreement between the Wisconsin Department of Employee Trust Funds (ETF) and Vitech Systems Group, Inc. was signed on February 28, 2014.

Vitech Systems Group is the Project Vendor for myETF. They are a leading software provider to insurance, retirement and investment organizations.



Project Scope

ETF is developing a new, web-based benefits administration system, referred to as myETF. The new system will modernize and improve ETF's IT capabilities and support more efficient business processes for ETF's customers. The new system is a fully integrated solution, allowing for advanced automation, user empowerment and excellence in customer service.



Employer Benefits of myETF

• Elimination of Annual Reconciliation

Employers will reconcile with each payroll.

Payroll-based Reporting Cycles

 Employers will report service and earnings based on their payroll cycle(s).

Move to Electronic Communications and Correspondence

 Most employer communications will take place through myETF Employer Online Services.

• New! ICI (Income Continuation Insurance) Database

 myETF will provide employers a place to enter employee ICI information electronically, and we'll store all ICI information in myETF.

Limited Paper Processes for Employers

 Most employer processes will take place in myETF Employer Online Services.

Real-time Processing

 Employers will no longer wait for electronic entries to process overnight, leading to up-todate data.

A Single Source of Information

 myETF will serve as the primary place employers access data.

Decrease in Data Errors

 Immediate system validations will reduce errors in the new system.

Intuitive Employer Interface

 We are designing myETF Employer Online Services with employers in mind, making it easy to use.



Project Mission

- ✓ Establish a single source of the "truth" and view of all information related to a *customer*
- ✓ Maximize opportunities for member and employer onlineservice capabilities
- ✓ Automate as many processes as possible
- ✓ Ensure the most current system security principles are in place
- ✓ Implement enhanced management reporting



Success Criteria

- ✓ Fully integrated benefits administration system.
- ✓ Customers that are empowered in their ETF relationship using online capabilities
- ✓ Efficient workflows which give staff tools and time to focus on the customer
- ✓ Customers transactions occur in a secure environment
- ✓ Provides relevant metrics which guide decision making



myETF Project Phases

The project consists of the following phases:

Phase 1: Launch

Phase 2: Requirements Confirmation

Phase 3: Infrastructure

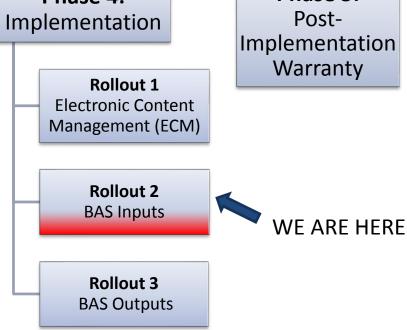
Phase 4: **Implementation**

Phase 5: Post-Warranty

Success - November 2015!

- ETF successfully deployed myETF (Rollout 1)
- Successful Engagement
 - Communications
 - Support
 - Training
 - Testing

Rollout: Divides the implementation of myETF into unique categories and functions based on business processes, business areas and targeted customers. The highest, broadest unit of work or categorization of business processes that corresponds to a go-live. The ETF project consists of three rollouts.





Overview: myETF 2018 Rollout





myETF 2018 Rollout – Functionality*

- Annual Statements (Line of Business Delivery)
- Beneficiary Maintenance
- Call Center and CRM (Employer Interactions)
- Customer Education (Employers)
- Customer Maintenance (Demographic Information) and Member Account
- Employer Reporting
 - Wage and Contribution Reporting
 - Ongoing Reconciliation (Replaces Annual Reconciliation)
 - Optional Benefit Plans
- Enrollment
- Group Insurance
 - Health Insurance
 - Life Insurance
 - Income Continuation Insurance

- Interest Crediting
- myETF Employer Online Services
- myETF Member Online Services for Group Insurance
- Power of Attorney (Identify Current Relationships)
- QDRO and Court Orders (All Except Annuitants)
- Service Credit Purchase (Application Processing, Payment, Allocation)
- Simultaneous Service Adjustments
- Third Party (Identify Current Relationships)
- Variable Transfer (All Except Annuitant Account Adjustments in BPS)

*Functionality Subject to Change



Systems Decommissioned

The following systems will be entirely decommissioned after the myETF 2018 Rollout:

- myETF Benefits System (MEBS)
- Online Network for Employers (ONE Site)

<u>Interfaces</u>

A computer interface is a way to share computer data. We use interfaces to communicate with our external partners, such as third-party administrators. ETF and our partners will still require interfaces after myETF is implemented.

- Health Insurance Exchanges with Health Plans
- Health Insurance Enrollment (UW Hospital and Clinics)
- CMS VDSA Program
- Payment Lockbox
- US Bank / E-Pay
- STAR

- US Bank Employer Payments & Returns
- Employer Files
- DHS Death Match
- SSA Death Match
- Address Interfaces



Overview: myETF Final Rollout





myETF Final Rollout – Functionality*

- Activity Tracking
- Annual Statements
- Benefit Estimates
- Benefit Processing and Calculations
- Call Center and CRM (Member Interactions)
- Customer Education (Member Services)
- Death
- Deferred Compensation
- Disability
- Flexible Compensation
- Management of Administrative Reviewers
- Multiple Service-Reciprocity (Eligible and Elections)
- myETF Member Online Services (Other than Group Insurance

- Optional Benefit Plans (Enrollment)
- Payroll and Payments
- Power of Attorney (Maintenance & Processing)
- QDRO and Court Orders (Annuitants)
- Retiree Return to Work
- Retirement (Calculations and Processing)
- Separation Benefits and Refunds
- Service Credit Purchase (Estimate/Application, Cost)
- Sick Leave Conversion Credit
- Tax Reporting
- Telephony and IVRJ Integration (Member & Employer)
- Third Party (Calculations and Processing)
- Variable Transfer (Annuitant Account Adjustments in BPS)

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*Functionality Subject to Change



Systems Decommissioned

The following systems will be entirely decommissioned after the myETF Final Rollout:

- Accumulated Sick Leave (AcSL)
- Online Calculators

<u>Interfaces</u>

A computer interface is a way to share computer data. We use interfaces to communicate with our external partners, such as third-party administrators. ETF and our partners will still require interfaces after myETF is implemented.

- Additional STAR Interfacing
- DOA Check Print
- DOA Check Ingest
- Vision Care Extract
- Vision Care Ingest
- MLIC Monthly Extract Confirm

- MLIC Annual Extract
- MLIC Periodic Ingest
- MLIC Periodic Insurance Certificate Ingest
- LTDI Ingest
- IRS Extracts (W2, 1042 and 1099R)
- WiDOR Filing Extracts (W2, 1042, 1099R)

Telephony



Project Communications









Communication Channels

- myETF Employer Webpage
 - News
 - **FAQs**
 - **Training Information**
 - **Glossary**
 - Schedule
 - And more...

ETF Email Updates



- **Employer Bulletins**
- **WRS News**





Questions?

Ideas?

Suggestions?

Contact: Employer Mailbox